

CALIFORNIA ECONOMIC BASE REPORT: NORTHERN SACRAMENTO VALLEY REGION



Prepared for the



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California Economic Strategy Panel

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PREFACE

The bipartisan California Economic Strategy Panel (Panel) was established in 1993 to develop an overall economic vision and strategy to guide public policy. The Panel engages in an objective and collaborative biennial planning process that examines economic regions, industry clusters, and cross-regional economic issues. The 15-member Panel is comprised of eight appointees by the Governor, two appointees each by the California Senate President Pro-Tempore and the California Assembly Speaker and one appointee each by the Senate and Assembly Minority Floor Leaders. The Secretary of the California Labor & Workforce Development Agency serves as the Panel Chair.

The California Regional Economies Project is currently the lead research mechanism for the Panel to identify economic policy issues. The project provides the state's economic and workforce development systems with data and information about changing regional economies and labor markets. The information provides a new resource in economic and workforce development planning and a bridge connecting economic and workforce policies and programs at the state and regional levels.

Since 1996, the Panel recognized the rapidly changing nature of the California economy and its economic regions. In order to understand the state's economy and the changes taking place within industry sectors and industry clusters, it is important to recognize the regional nature of the economy and to analyze the economic base by region. To do this, the statewide and nine regional economic base reports analyze the patterns of employment, business establishments, wages, population, unemployment rate and other key factors.

This report presents a statewide overview and comparative analysis of the nine regions from 2001 to 2004. Also, in-depth economic base reports for each region are available. The previous economic base reports examined the 1990-2002 period, and were the first economic base reports for the regional economies as they are defined today. The Panel's initial work, from 1994-1996, resulted in identification of six regions and provided regional economic base analyses; however, those regions had been significantly redefined by 1998, making comparisons to the early analyses impractical.

The source of the data used for these reports is the official employment and wage information reported by employers to the State. While a variety of other sources provide similar information, they may not capture the official numbers that employers report, or may not include input from all employers. This data source is the most comprehensive and accurate source of information direct from employers, and is therefore the best to use for public policy-making, planning and program administration.

The Panel has taken steps to institutionalize the analysis and preparation of these economic base reports within State government so that this analysis may be provided on a yearly basis. Also, steps have been taken to leverage the body of knowledge that now exists around the study of industry clusters, gained through the California Regional Economies Project.

First, a non-confidential version of the data series, the *California Regional Economies Employment Series*, has been made available online by the California Employment Development Department's Labor Market Information Division so that regional organizations may access this data at the county level. Second, a step-by-step guide, the *Clusters of Opportunity User Guide*, is available online so that regional organizations can conduct industry cluster studies and work with business and industry to test and apply the findings. With this information, regional organizations may conduct their own economic base and industry cluster analyses down to the county level, and they may combine county data to create their own sub-regional study areas. Training workshops have been held to teach the methodology and processes outlined in the *Clusters of Opportunity User Guide* to representatives from local and regional organizations including Local Workforce Investment Boards, economic development organizations, and community colleges.

The statewide and regional economic base reports, the *Clusters of Opportunity User Guide* and other studies are available on the Panel's website at <http://www.labor.ca.gov/panel/>.

The *California Regional Economies Employment Series* is available online at <http://www.labormarketinfo.edd.ca.gov/cgi/databrowsing/?PageID=173>.

The California Regional Economies Project is sponsored by the California Labor & Workforce Development Agency, California Employment Development Department, and California Workforce Investment Board.

TABLE OF CONTENTS

PREFACE	3
INTRODUCTION	6
THE NORTHERN SACRAMENTO VALLEY REGION	8
THE ECONOMIC BASE.....	9
THE FOOD CHAIN.....	14
CONSTRUCTION	17
MANUFACTURING VALUE CHAIN	20
RETAIL TRADE	22
ADMINISTRATIVE, SUPPORT & WASTE SERVICES	25
HEALTH SCIENCES & SERVICES	27
ENTERTAINMENT & TOURISM	31
OTHER SERVICES (Except Public Administration).....	34
ALL GOVERNMENT	37
 APPENDIX A: Definition of Industry Sectors and Clusters by NAICS Codes	 39

INTRODUCTION

The California Regional Economies Project provides data and information about changing regional economies and labor markets. The information provides a new resource in economic and workforce development planning, and a bridge connecting economic and workforce policies and programs at the state and regional levels.

In order to understand the state's economy and the changes taking place within industry sectors and industry clusters, it is important to recognize the regional nature of the economy and to analyze the economic base by region. To do this, the statewide and nine regional economic base reports analyze the patterns of employment, business establishments, wages, population, unemployment rate and other key factors.

This report presents an in-depth analysis of the Northern Sacramento Valley Region's economic base from 2001 to 2004. The previous economic base report examined the 1990-2002 period. The statewide and eight other regional economic base reports are also available at <http://www.labor.ca.gov/panel/>.

Data Sources

The Quarterly Census of Employment and Wages (QCEW) data is the source for the private industry data, which uses the North American Industry Classification System (NAICS) coding system. The Current Employment Statistics (CES) data is the source for all levels of government employment data. The CES data does not offer wage information, so the government wage information in this report was taken from the federal Bureau of Labor Statistics (BLS) QCEW non-confidential data available online. A more detailed explanation of the data sources is available in the statewide report.

Industry Clusters versus Sectors

An industry sector is a group of firms that are doing the same type of work, making the same type of products, or providing the same types of services. Examples include manufacturing, construction, retail trade and health care.

An industry cluster is a group of interdependent industry sectors characterized by competing firms and buyer-supplier relationships, as well as shared labor pools and other specialized infrastructure. They are also geographically concentrated. When identifying "industry clusters of opportunity," the Project adds additional considerations that focus on employment opportunities for regional residents.

Definition of the Economic Base Industries

Economists divide industries into two groups; export-oriented and local-serving (also referred to as population-driven). Export-oriented industries are industries that sell a large portion of their goods and services to people and businesses in markets outside of the region, creating capital (bringing capital into) the region. Local-serving industries are industries that sell their

goods and services to people and businesses in markets within the region. These industries do not typically create new capital for the region, but recirculate it within the region.

In the previous economic base reports completed in 2004, the two principal researchers who provided the analyses did not agree on a common definition of an area's economic base. One favored the traditional approach, while the researcher analyzing the rural regions felt that there were key local-serving industries that were critical to these regions and should be included in the economic base.

For the current economic base reports, we have chosen to include some industries in our definition of the economic base that are not traditionally included. We do this in part due to the transformations taking place within the industries or regions, and also in recognition of the importance of industries that provide significant employment opportunities for the region, including some high-wage/high-demand sectors and clusters that would otherwise not be included.

While the traditional discussion of an economic base is still the one most used by economists, we feel the other perspective better fits the nature of the California Regional Economies Project, which constantly views the economy in new ways and from new perspectives in order to see transformations taking place. We acknowledge that this use of the term, "economic base," conflicts with the standard definition, and that we are choosing to redefine it for the purpose of these reports. We respect that some will disagree with our use of the term in this way; however, this should not detract from the important economic information presented in the reports. The current reports begin to address the differences in the definition of the regions' economic base industries, which began with the first economic base reports. We plan to revisit this issue again in the future.

A detailed discussion of the definition of the economic base and the differences between the previous and current reports is available in the statewide report.

Definitions by NAICS code for all of the industry sectors and clusters in the statewide overview and regional economic base reports may be found in Appendix A.

THE NORTHERN SACRAMENTO VALLEY REGION



The Northern Sacramento Valley Region includes five counties — Butte, Colusa, Glenn, Shasta and Tehama. This region accounts for 1.4% of California's jobs and 1.4% of its population. The region's unemployment rate in 2005 was 7.1%. This region had the second highest unemployment rate of the nine regions, well above the state average of 5.4%.

From 1990 to 2003, the Northern Sacramento Valley Region experienced job growth of 25%, as reported in the first economic base report. Since the recent recession, from 2001 to 2004, job growth has continued, increasing by 3.1%. During this time, private industry jobs increase by 3.5% and Government jobs increased by just 1.5%.

Characteristics of the Northern Sacramento Valley Region

(Numbers are in thousands, except for dollar amounts)

	Northern Sacramento Valley	California	No. Sac. Valley as % of CA
Population (2006)	510	37,172	1%
Labor Force (2005)	239	17,696	1%
Unemployment Rate (2005)	7.1%	5.4%	132%
Manufacturing Jobs* (2004)	10.5	1,507.8	1%
Per Capita Income (2004)	\$ 25,631	\$ 35,219	73%
Average Wage (2004)	\$ 27,901	\$ 43,724	64%

Source: Jobs, Labor Force, Unemployment Rate and Average Wage – California Employment Development Department, Labor Market Information Division; Population and Per Capita Income – U.S. Bureau of Economic Analysis

* Manufacturing Jobs reported here are traditional production jobs (NAICS 31-33).

Entrepreneurship plays a critical role in regional economic development in rural California. It has been the key to increasing the number of establishments in rural regions, as opposed to established businesses moving or expanding into the region, according to the study, *Patterns of Entrepreneurship in Rural California*. The study also showed that the total number of establishments grew by about 18% between 1990 and 2003 across all of the rural regions. (Growth for the Northern Sacramento Valley Region alone was not cited in the study.)

During the period 2001-2004, the Northern Sacramento Valley Region reported a net increase of over 3,000 private industry establishments (up 16%), from 19,200 to 22,300 total establishments. The industry sectors or sub-sectors reporting the greatest increase in number of establishments were Private Households, Ambulatory Health Care Services and Construction of Buildings (led by Residential Building Construction and Specialty Trade Contractors).

THE ECONOMIC BASE

The economic base is traditionally considered to be made up of export-oriented industries in the study area - industries that sell a large portion of their goods or services to people and businesses in markets outside of the area. For the purpose of this report, we have chosen to include industries in our definition of the economic base that are not traditionally included. We acknowledge that our definition of the economic base differs from standard practice. We do this in part due to the transformations taking place within the industries or region, and also in recognition of the importance of industries that provide significant employment opportunities for the region, including some high-wage/high-demand industries that would otherwise not be included.

Economic base reports also typically look only at industry sectors; however, this analysis will also include industry clusters, where studies by the California Regional Economies Project have defined clusters that provide significant employment for the region¹.

The criteria for selecting the components of the economic base include the top job providers in 2004, those industries with a high growth rate from 2001 – 2004, and the top job generators from 1990 to 2002, as identified in the previous economic base report. In those cases where industry clusters are examined beginning with the 2001-2004 period, direct comparisons may not be possible with the findings from the first economic base report.

Based on these criteria, the industry clusters and industries included in the Northern Sacramento Valley Region's economic base for this analysis are the following², listed by NAICS code:

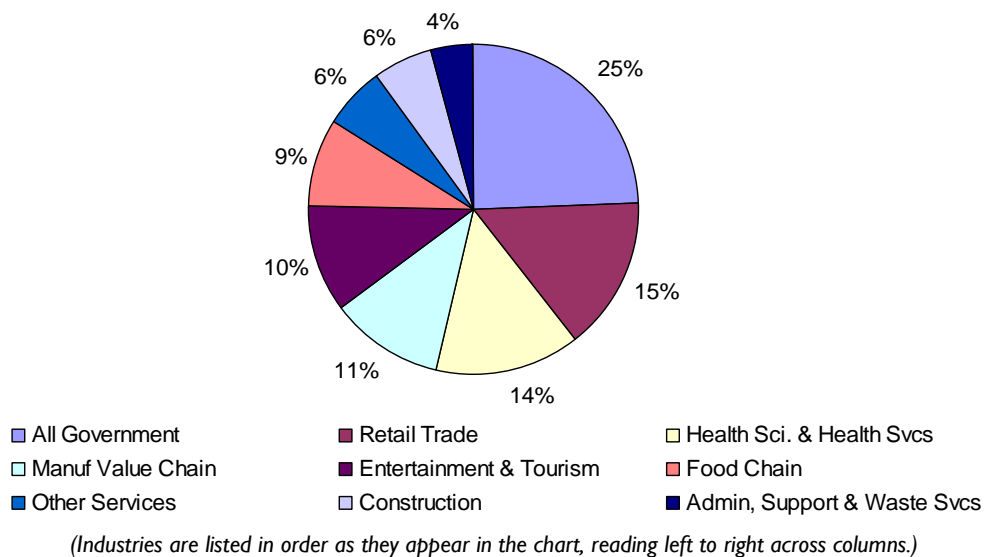
- The Food Chain
- Construction
- Retail Trade
- Manufacturing Value Chain
- Administrative, Support & Waste Management Services
- Health Sciences & Services
- Entertainment & Tourism
- Other Services
- All Government

The total jobs reported by the economic base industries and clusters represent over 85% of the region's total jobs. From 2001-2004, economic base employment grew by over 3,500 jobs, or over 2%.

¹ Industry Clusters of Opportunity are defined by the California Regional Economies Project as geographically-concentrated, and interdependent industry sectors characterized by competing firms and buyer-supplier relationships, as well as shared labor pools and other specialized infrastructure. In addition to export-oriented sectors, they also include population-driven sectors as well as sectors that offer occupations with career potential.

² See Appendix A for a complete listing of all sub-sectors included in the economic base industries and industry clusters.

Composition of the No. Sacramento Valley Region Economic Base 2004

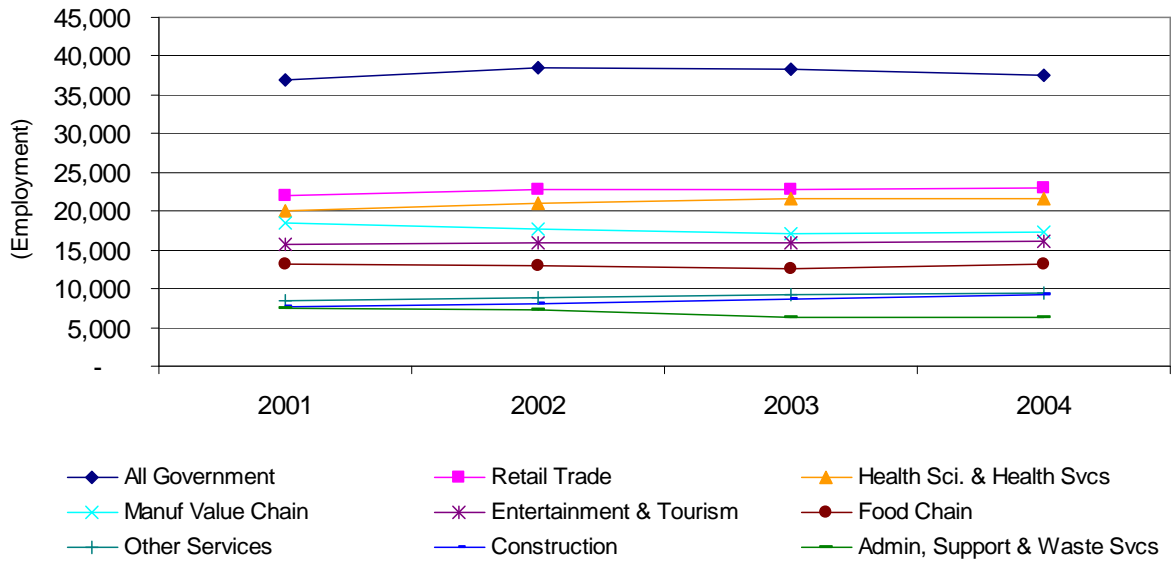


All Government continues to provide the most jobs for the region, with 37,500 jobs in 2004. This represents 24.5% of the economic base jobs, and over 21% of the region's total jobs. Retail Trade was second, with 23,000 jobs; 15% of the economic base, and 13% of all jobs in the region.

The Health Sciences & Services industry cluster was the third largest component of the economic base, with 21,700 jobs in 2004; over 14% of the region's economic base jobs. This was followed by the Manufacturing Value Chain cluster, reporting 17,200 jobs, or just over 11% of the region's economic base. The Entertainment & Tourism industry provided 16,000 jobs, over 9% of the economic base, and the Food Chain cluster provided 13,100 jobs, almost 9% of the economic base.

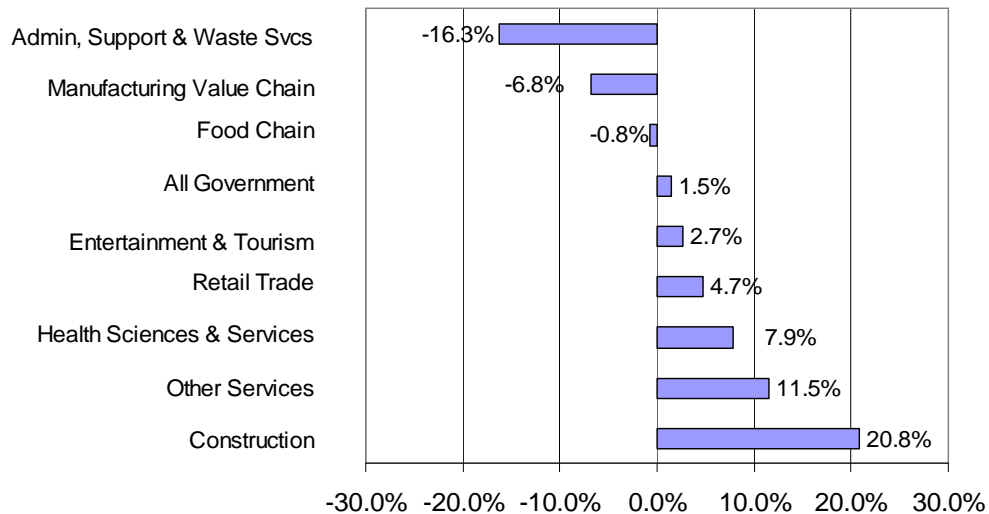
The remaining industries in the economic base are the Other Services industry, which provided about 9,500 jobs, over 6% of the economic base; Construction (9,100 jobs), 6% of the economic base; and, Administrative, Support & Waste Management Services (6,300 jobs), 4% of the economic base. (Other Services does not include public administration jobs, and represents a variety of services, such as automotive repair and maintenance, religious and civic organizations, personal care services and professional organizations.)

Nothern Sacramento Valley Economic Base Employment



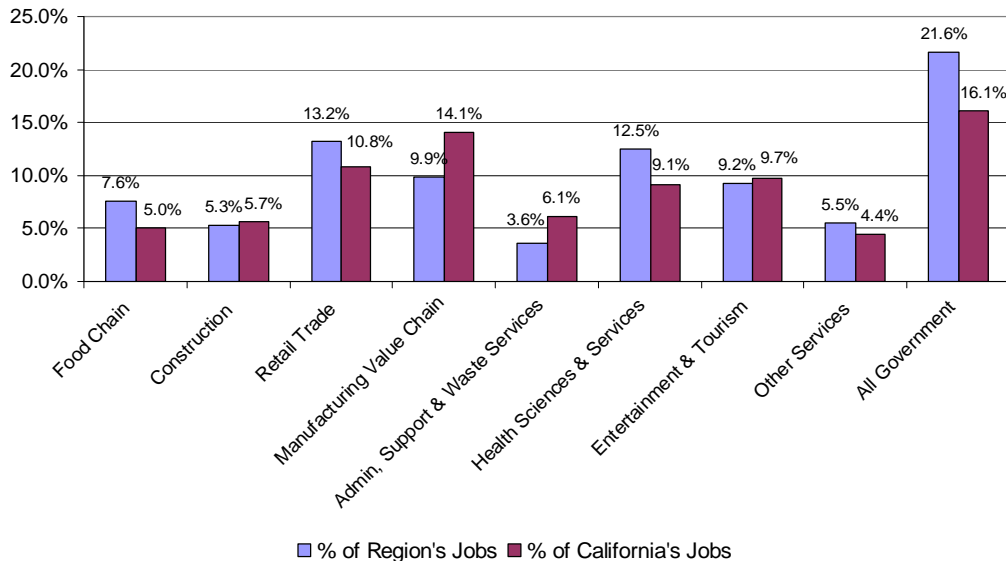
In addition to size, another important measure is job growth. From 2001-2004, six industries and clusters in the economic base reported job growth. Listed by percentage growth, these include Construction (up almost 21%); Other Services (up 11.5%); Health Sciences & Services (up almost 8%); Retail Trade (up almost 5%); Entertainment & Tourism (up almost 3%); and, All Government (up 1.5%). The remaining industry sectors and clusters reported job losses for the period.

Economic Base Job Growth 2001-2004



Another factor to consider is the concentration of an industry within a region – the percentage of the region’s jobs that the industry provides – and also how this compares to the concentration within the state or nation. The following graph compares the concentration of the leading employment sectors in the region to the statewide concentration.

**Share of Regional and Statewide Employment
2004**



The average annual wage³ for all industries in the Northern Sacramento Valley Region is \$27,901. This region has the third lowest overall average wage of all nine regions. Within the region’s economic base, the average annual wage by industry and cluster ranges from a high of \$37,409 for Manufacturing Value Chain jobs, to a low of \$11,943 for Entertainment & Tourism jobs. (Wages for the All Government industry are not available.)

The Manufacturing Value Chain cluster reports the highest average wage and provides 11% of the jobs in the region’s economic base. Entertainment & Tourism reported the lowest average wages and provides 15% of the economic base jobs.

Health Sciences & Services reported the greatest (percentage) increase in average wages from 2001 to 2004, rising over 14%, from \$30,592 in 2001 to \$34,919 in 2004; the industry provides 14% of the region’s economic base jobs. The industry or cluster reporting the least change was Administrative, Support & Waste Services, only increasing by just over 3% during this period; the industry provides 4% of the economic base jobs.

³ The average annual wage is calculated by dividing the total wages by the total employment (both figures are reported by the employers); the wages and employment data reported do not distinguish between part and full time hours or overtime hours worked. This statistic provides good information for making comparison and tracking trends; however, it may not be the best resource available for employers or researchers and service providers to use when determining a competitive or typical pay scale for employees in a particular industry and/or region.

The following table provides the average annual wage for each industry and cluster in the region's economic base, and compares these to the statewide averages. It also shows the percentage of the economic base jobs that each industry/cluster provides, to point out the percentage of jobs in the higher and lower paying industries/clusters.

Average Annual Wages 2004	Statewide	No. Sacramento Valley Region	% of Region's Economic Base Jobs
ALL INDUSTRIES	\$ 43,724	\$27,901	
Food Chain	31,939	27,799	9%
Construction	43,707	34,189	6%
Manufacturing Value Chain	54,162	37,409	11%
Retail Trade	28,546	24,101	15%
Admin & Waste Services	28,923	20,372	4%
Health Sciences & Services	49,205	34,919	14%
Entertainment & Tourism (Rural)*	20,802	11,943	10%
Other Services	23,542	18,367	6%
All Government	47,835	36,279	25%

* The definition of the Entertainment & Tourism industry differs from urban to rural regions, for the purpose of this report. For urban regions, Entertainment & Tourism combines Arts, Entertainment & Recreation with Accommodation and Motion Picture & Sound Recording Industries; it does not include Food Services. For rural regions, Entertainment & Tourism combines Accommodation & Food Services with Arts, Entertainment & Recreation; it does not include Motion Picture & Sound Recording Industries. For the statewide analysis, the Entertainment & Tourism industry combines Accommodation & Food Services with Arts, Entertainment & Recreation, and also includes Motion Picture & Sound Recording Industries.

** Government average annual wages include the wages for a broad spectrum of jobs, including elected officials and executive branch, judicial, defense, law enforcement, firefighting, education and other public administration jobs. The source for this data is the Bureau of Labor Statistics (BLS) online QCEW data, as the CES data used for the government employment numbers does not include wage information.

The remainder of this report discusses each economic base industry or cluster in further detail.

THE FOOD CHAIN

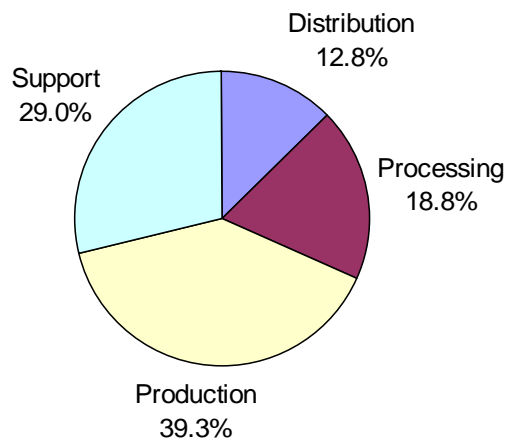
The Food Chain cluster has been defined by the California Regional Economies Project as including not only Production sectors, but also Support, Processing and Distribution sectors. The previous economic base report only looked at agriculture as a part of the Resource Based industries. This report will instead look at the Food Chain cluster.

The Food Chain cluster provides almost 9% of the economic base jobs for the Northern Sacramento Valley Region, and over 7% of all jobs in the region.

From 1990-2002, the Agriculture, Forestry, Fishing & Hunting industry employment decreased by about 1,700 jobs, reporting approximately 8,800 jobs in 2002.

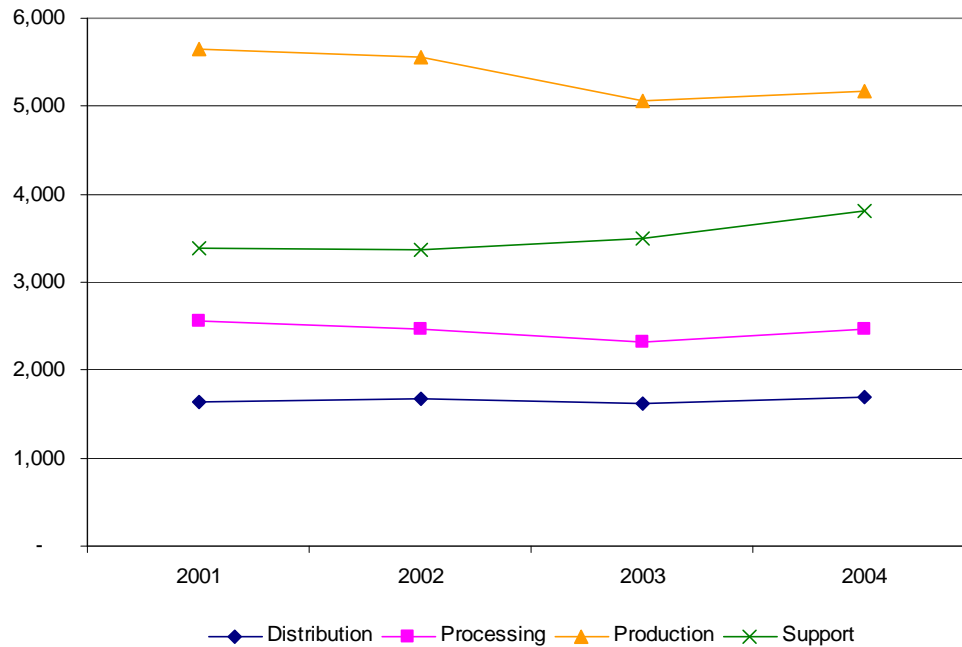
For the 2001-2004 period, the Food Chain cluster experienced net job losses of just 100 jobs, or less than 1%, dropping from over 13,200 jobs in 2001 to over 13,100 jobs in 2004. In 2004, Support represented 29% of the cluster; Production represented over 39%; Processing represented almost 19%; and, Distribution represented almost 13%.

**The No. Sacramento Valley Region Food Chain
2004**



From 2001-2004, two components of the cluster reported job growth, while two reported job losses. The Support and Distribution components reported growth of over 12% and almost 3%, respectively. At the same time, Production lost 400 jobs (down over 12%), and Processing lost almost 100 jobs (down 3.5%).

Food Chain Jobs



Within Support, the largest sub-sector by far is Support Activities for Crop Production, with over four times the second sub-sector, Veterinary Activities. Within Production, the largest sub-sector is Fruit & Tree Nut Farming, followed by Oilseed & Grain Farming and All Other Miscellaneous Crop Farming. Within Processing, the largest sub-sector is Fruit & Vegetable Preserving & Specialty Food Manufacturing, followed by Grain & Oilseed Milling. Within Distribution, the largest sub-sector is Specialty Food Stores, followed by Grocery & Related Product Wholesalers.

The Food Chain cluster's average annual wage for the region in 2004 was \$27,799. Within the cluster, for Support jobs the average annual wage was \$24,289; for Production jobs the average was \$24,046; for Processing jobs the average was \$33,834; and, for Distribution jobs the average was \$32,900. The Food Chain cluster provides 9% of the region's economic base jobs.

The Food Chain Wages



The following table provides information on employment by major component:

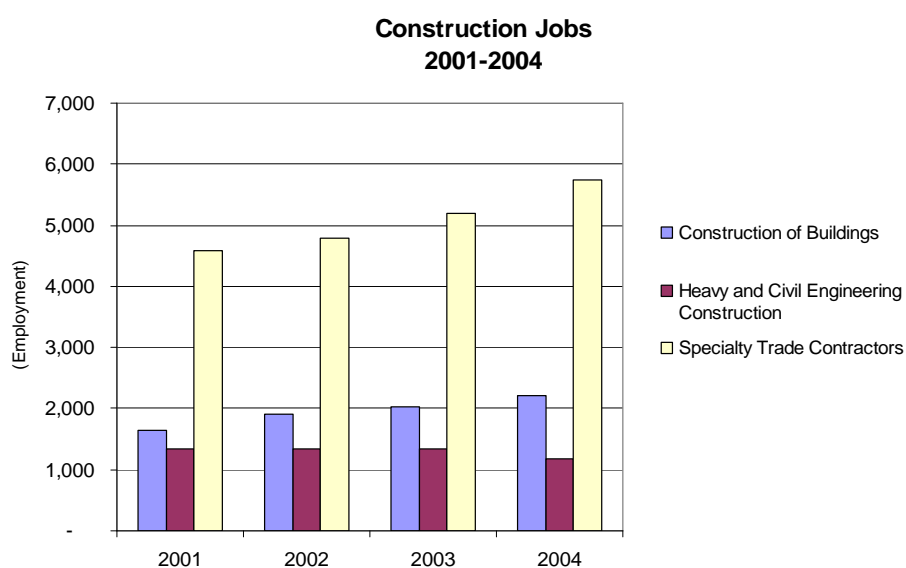
Northern Sacramento Valley Region				
Food Chain				
(Thousands of Jobs)				
	2001	2002	2003	2004
Support	3.4	3.4	3.5	3.8
Production	5.6	5.6	5.1	5.2
Processing	2.6	2.5	2.3	2.5
Distribution	1.6	1.7	1.6	1.7

Source: California Employment Development Department

CONSTRUCTION

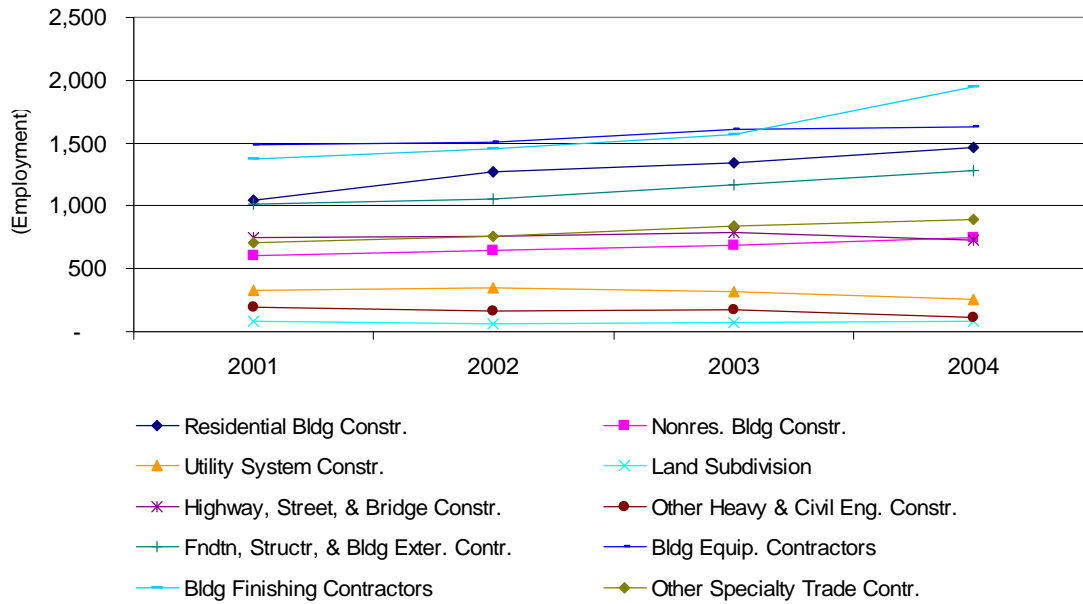
The Construction industry provided 6% of the economic base jobs for the Northern Sacramento Valley Region in 2004, and over 5% of all jobs in the region.

During the period of 1990 – 2002, Construction reported job losses of 5%, or almost 500 jobs. Construction employment decreased during the recession of the early '90s then grew from 1995 to 2002, but jobs were still not back to the 1990 level. Coming out of the recent recession, Construction jobs grew significantly from 2001 to 2004, adding almost 1,600 jobs. Industry employment reached almost 8,600 jobs in 2003 and then over 9,100 jobs in 2004 – finally above the 1990 level. This represented a growth rate of almost 21% during the 2001-2004 period, the highest of any industry sector or cluster in the region.



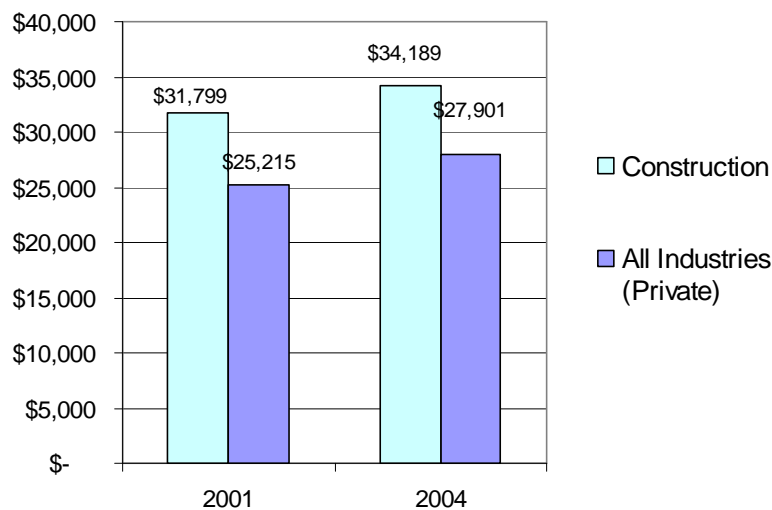
Within the Construction industry, the sectors providing the greatest number of jobs are Specialty Trade Contractors (led by Building Finishing Contractors) and Construction of Buildings (led by Residential Building Construction). Specialty Trade Contractors provided over 5,700 jobs, or 63% of the industry's employment. The Building Finishing Contractors sub-sector provided the most jobs of any sub-sector – over 1,900 jobs in 2004.

Construction Sub-sector Jobs



The industry's average annual wage for the region in 2004 was \$34,189, up 7.5% from the 2001 average of \$31,799. Construction provides 6% of the region's economic base jobs. The following chart shows the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

Construction Wages



The following table provides information on employment in the Construction industry:

Northern Sacramento Valley Construction (Thousands of Jobs)					
	1990	1994	2000	2002	2004
Residential Building Construction	1.9	0.9	1.0	1.3	1.5
Nonresidential Building Construction	1.0	0.6	0.6	0.7	0.7
Utility System Construction	0.4	0.3	0.4	0.3	0.3
Land Subdivision	0.1	0.0*	0.1	0.1	0.1
Highway, Street & Bridge Construction	0.7	0.6	0.7	0.8	0.7
Other Heavy & Civil Engineering Construction	0.2	0.1	0.2	0.2	0.1
Foundation, Structure, & Exterior Contractors	0.9	0.7	1.0	1.1	1.3
Building Equipment Contractors	1.2	0.9	1.4	1.5	1.6
Building Finishing Contractors	1.4	1.0	1.1	1.5	1.9
Other Specialty Trade Contractors	0.7	0.5	0.7	0.8	0.9

Source: California Employment Development Department. Data for 1990 – 2002 are presented from the previous economic base report for 1990, 1994, 2000 and 2002. Data for 2004 are presented from the current analysis of 2001-2004 data. The data source has changed since the earlier report.

* Employment was reported; however, jobs were less than 50, which rounded to 0.0 thousands.

MANUFACTURING VALUE CHAIN

Manufacturing industries are important for innovation, high wages and exports. Yet, the production component of manufacturing is not likely to be a growing source of job growth for the region or the state.

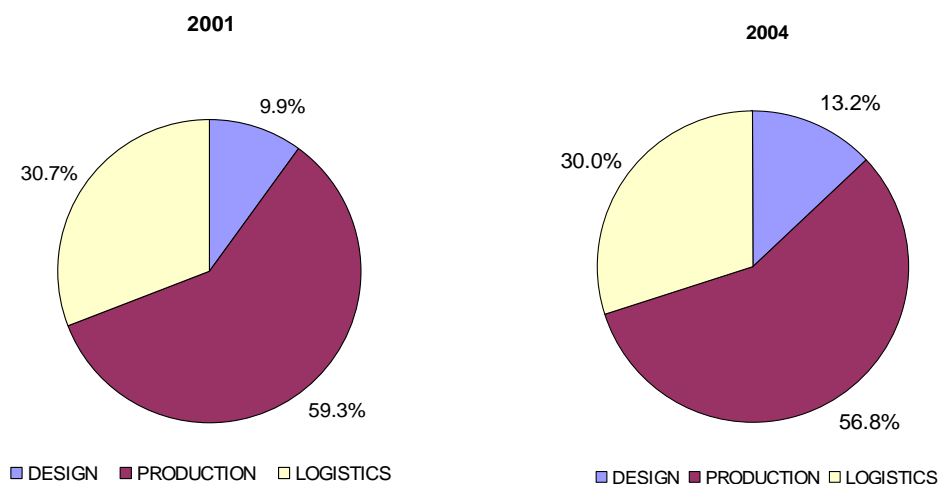
California's manufacturing industry is undergoing a transformation. While traditional manufacturing (production) jobs are declining, job growth is occurring in the design and logistics (warehousing and delivery) phases of manufacturing. Improvements in production technology have impacted the number of production jobs while the "just in time" approach to supply and delivery is lowering warehousing costs and has increased the number and types of jobs in logistics.

The California Regional Economies Project calls this industry cluster the Manufacturing Value Chain. The design and logistics components of manufacturing are providing more middle and higher-level jobs that pay well and offer career development opportunities.

Manufacturing remains a critical component of the Northern Sacramento Valley Region's economy. While Production now represents 5.5% of the region's jobs, the combined Manufacturing Value Chain provides almost 10% of the region's jobs, and over 11% of the jobs in the economic base.

In 2004, Design represented just over 13% of the Manufacturing Value Chain cluster; Production represented almost 57%; and, Logistics represented 30% of the cluster.

The following graph illustrates how Design, Production and Logistics jobs have changed from 2001 to 2004:



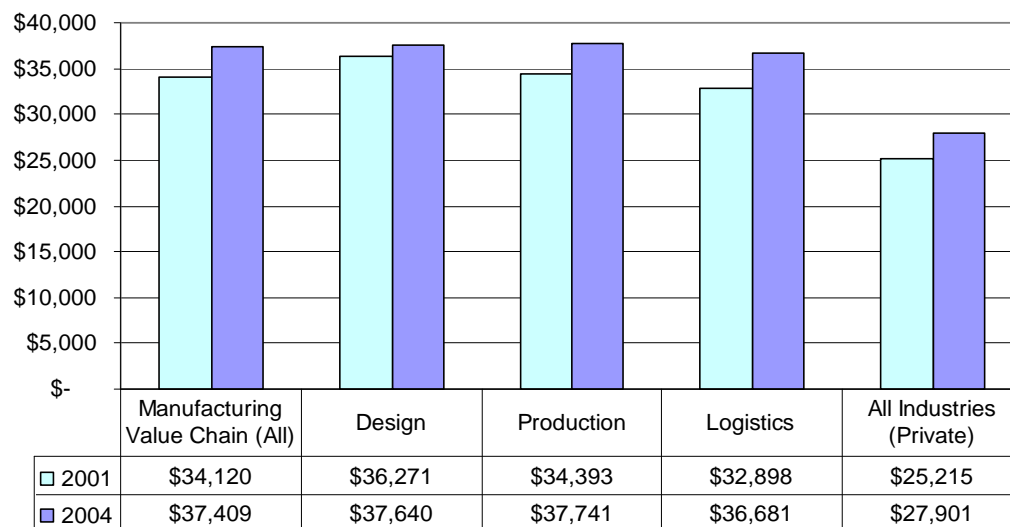
Within the Design component of the Manufacturing Value Chain, the Architectural, Engineering & Related Services sub-sector provided the most jobs in 2004, but the most growth from 2001-2004 took place in Management, Scientific & Technical Consulting Services.

Within Production, the Sawmills & Wood Preservation sub-sector reported the most jobs (almost 2,300), followed by Fruit & Vegetable Preserving & Specialty Food Manufacturing.

Within Logistics, the General Freight Trucking sub-sector provided the most jobs, followed by Warehousing & Storage.

The Manufacturing Value Chain cluster's average annual wage for the region in 2004 was \$37,409, up almost 10% from the 2001 average of \$34,120. Within the cluster, the component with the highest average annual wage is Production, with an average of \$37,741 in 2004. The Manufacturing Value Chain provides 11% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

The Manufacturing Value Chain Wages



RETAIL TRADE

The Retail Trade industry provides over 15% of the jobs in the Northern Sacramento Valley's economic base, second only to All Government, and almost 13% of all jobs in the region.

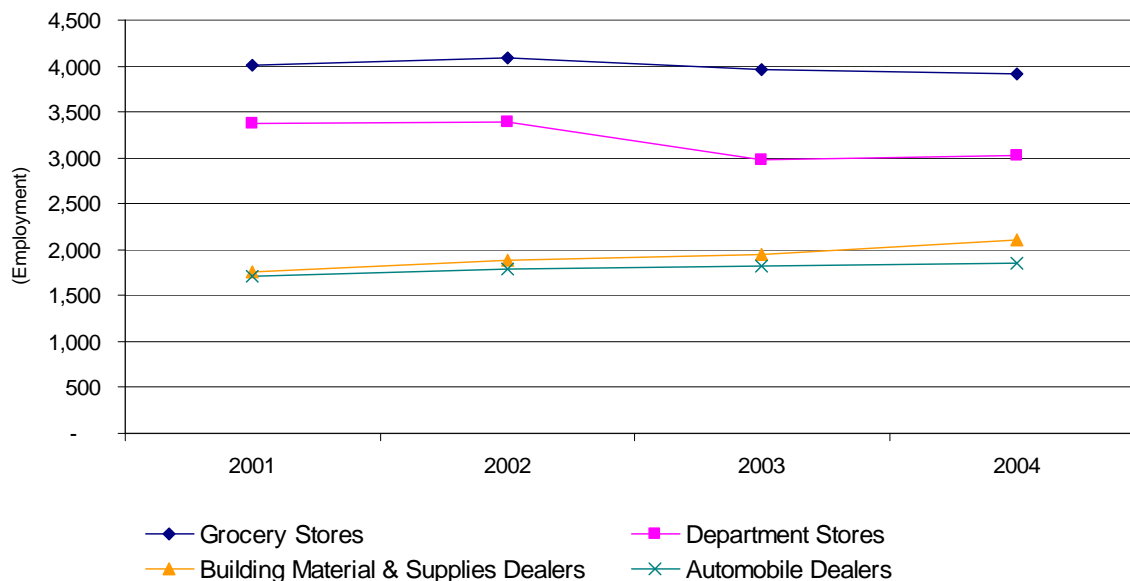
From 1990 – 2002, jobs in Retail Trade grew from about 9,500 to 23,000, an increase of 13,500 jobs. The largest sub-sector was Grocery Stores, which actually lost jobs during this period. The sub-sectors reporting the most growth were Building Materials & Supplies Dealers, Electronics & Appliance Stores and Specialty Food Stores.

For the 2001-2004 period, Retail Trade increased by 1,000 jobs (almost 5%), to about 23,000 jobs. Within the industry, the largest sub-sectors are Grocery Stores (3,900 jobs), Department Stores (3,000 jobs), Building Material & Supplies Dealers (2,100 jobs) and Automobile Dealers (almost 1,900 jobs). As during the 1990-2002 period, Grocery Stores reported job losses (down 2.5 %).



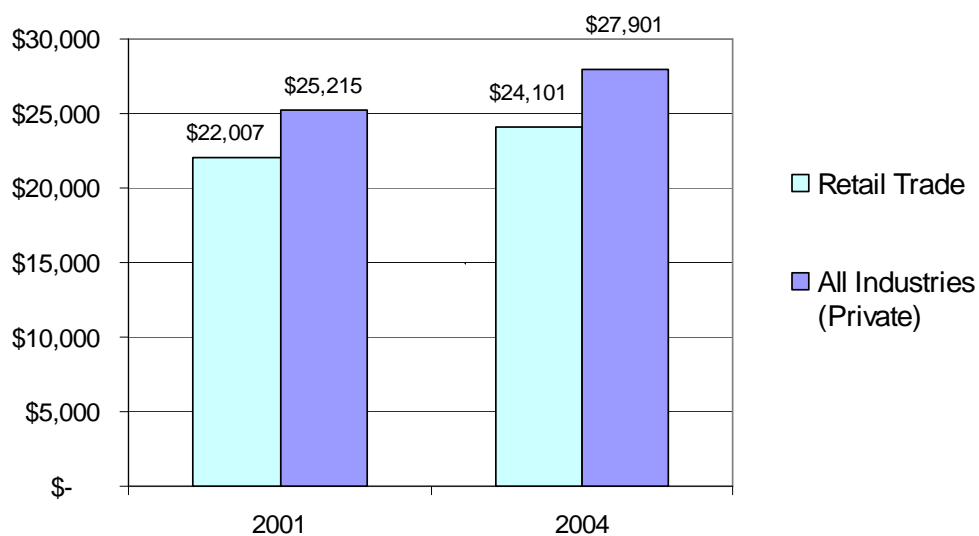
The highest rate of growth for 2001-2004 was reported by smaller sub-sectors. Used Merchandise Stores reported job growth of almost 134% (reaching almost 200 total jobs in 2004); Other General Merchandise Stores, rose 108% (total jobs just over 1,000 in 2004); Electronic Shopping & Mail-Order Houses grew by 57% (total jobs just over 100); and, Home Furnishings Stores grew by 51% (total jobs almost 400).

Jobs in Leading Retail Sectors



The industry's average annual wage for the region in 2004 was \$24,101, up 9.5% from the 2001 average of \$22,077. Retail Trade provides 15% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

Retail Trade Wages



The following tables provide employment data for the sub-sectors within the Retail Trade industry. The sub-sectors in the second table were not included in the 1990-2002 economic base report; three of the sub-sectors were the fastest growing for 2001-2004.

Northern Sacramento Valley					
Retail Trade					
(Thousands of Jobs)					
	1990	1994	2000	2002	2004
Automobile Dealers	1.4	1.5	1.7	1.8	1.9
Other Motor Vehicle Dealers	0.3	0.3	0.4	0.4	0.5
Auto Parts, Accessories, and Tire Stores	0.8	1.0	1.2	1.2	1.1
Furniture Stores	0.2	0.2	0.3	0.3	0.4
Home Furnishings Stores	0.3	0.3	0.3	0.3	0.4
Electronics & Appliance Stores	0.5	0.5	0.7	0.8	0.9
Building Material & Supplies Dealers	1.7	1.5	1.7	1.9	2.1
Lawn & Garden Equipment & Supplies Stores	0.3	0.2	0.3	0.3	0.3
Grocery Stores	4.2	4.1	4.0	4.2	3.9
Specialty Food Stores	0.6	0.4	0.5	0.7	0.6
Beer, Wine & Liquor Stores	0.3	0.2	0.2	0.2	0.1
Health & Personal Care Stores	1.0	1.3	1.4	1.5	1.5
Gasoline Stations	1.2	1.6	1.7	1.5	1.4
Clothing Stores	0.8	0.7	0.6	0.9	1.0
Shoe Stores	0.2	0.2	0.2	0.2	0.2
Jewelry, Luggage & Leather Goods Stores	0.1	0.2	0.2	0.2	0.2

Source: California Employment Development Department. Data for 1990 – 2002 are presented from the previous economic base report for 1990, 1994, 2000 and 2002. Data for 2004 are presented from the current analysis of 2001-2004 data. The data source has changed since the earlier report.

* Employment was reported; however, jobs were less than 50, which rounded to 0.0 thousands.

Northern Sacramento Valley		
More Retail Trade Sub-Sectors		
(Thousands of Jobs)		
	2001	2004
Sporting Goods, Hobby & Musical Instrument Stores	0.6	0.7
Book, Periodical & Music Stores	0.3	0.2
Department Stores	3.4	3.0
Other General Merchandise Stores	0.5	1.0
Florists	0.1	0.1
Office Supplies, Stationery & Gift Stores	0.7	0.5
Used Merchandise Stores	0.1	0.2
Other Miscellaneous Store Retailers	0.4	0.5
Electronic Shopping & Mail-Order Houses	0.1	0.1
Vending Machine Operators	0.0*	0.0*
Direct Selling Establishments	0.3	0.3

Source: California Employment Development Department. Data for 2001 and 2004 are presented from the current analysis of 2001-2004 data. The data source has changed since the earlier report.

* Employment was reported; however, jobs were less than 50, which rounded to 0.0 thousands.

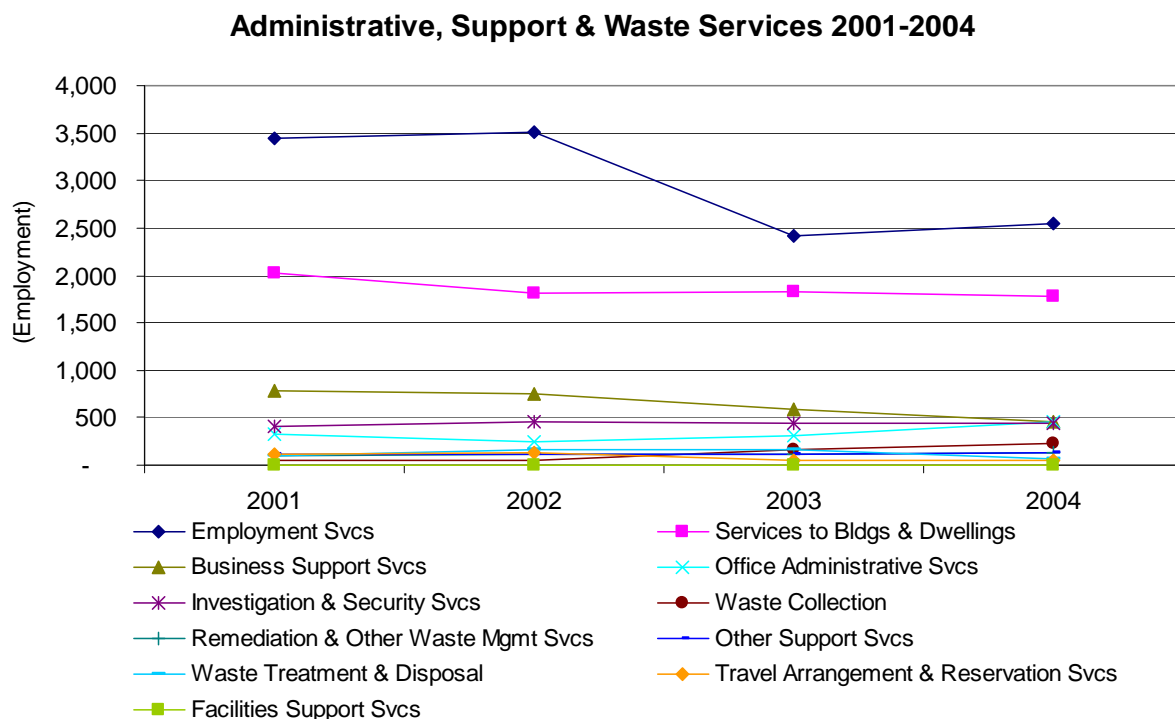
ADMINISTRATIVE, SUPPORT & WASTE SERVICES

Administrative, Support & Waste Services includes the sectors Administrative & Support Services and Waste Management & Remediation Services. This industry provided 4% of all economic base jobs in the Northern Sacramento Valley Region, and 3.5% of the region's total jobs.

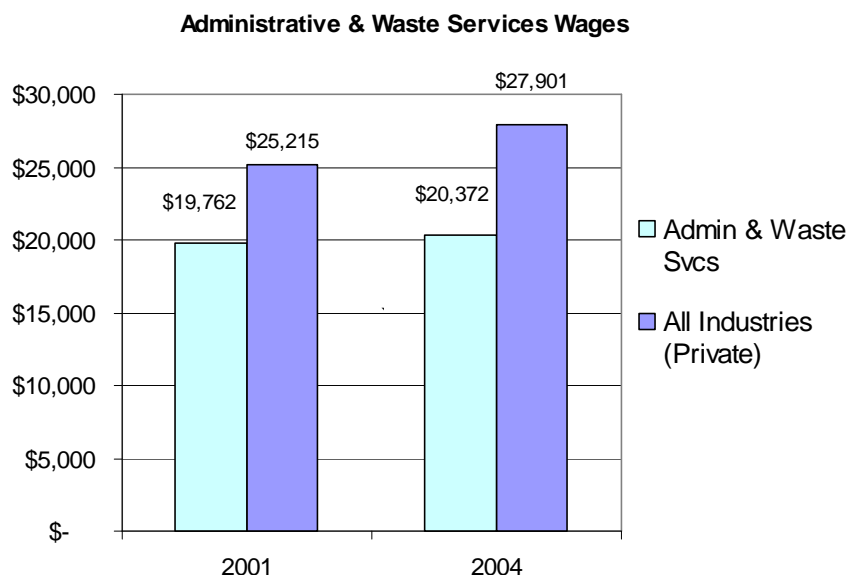
From 1990-2002, Administrative, Support & Waste Services grew over 90%. Growth was strongest from 1990-2000, then employment leveled off from 2000-2002, with a slight decrease. Employment has since continued to decline, reporting job losses of about 1,200 jobs for the period of 2001-2004, or over 16%.

Administrative, Support & Waste Services is made up of eleven sub-sectors, two of which provide the majority of the employment within the industry. These are Employment Services and Services to Buildings & Dwellings. Both grew from 1990-2002, with Employment Services growing fastest and remaining the largest sub-sector. From 2001 to 2004, both sub-sectors reported job losses while still providing the majority of the industry's jobs. Employment Services lost 900 jobs, down over 26%, and Services to Buildings & Dwellings lost about 250 jobs, down 12.5%.

The following graph shows the changes in employment for all eleven sub-sectors from 2001 through 2004:



The industry's average annual wage for the region in 2004 was \$30,372, up just over 3% from the 2001 average of \$19,762. Administrative, Support & Waste Services provides 4% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).



The following table provides employment data for the sub-sectors within the industry:

Northern Sacramento Valley Administrative, Support & Waste Services (Thousands of Jobs)					
	1990	1994	2000	2002	2004
Office Administrative Services	0.1	0.1	0.3	0.3	0.5
Facilities Support Services	0.0	0.0	0.0	0.0	0.0
Employment Services	1.7	1.8	3.7	3.5	2.5
Business Support Services	0.2	0.3	0.8	0.8	0.5
Travel Arrangement & Reservation Services	0.1	0.2	0.2	0.1	0.0*
Investigation & Security Services	0.3	0.3	0.4	0.5	0.5
Services to Buildings & Dwellings	1.1	1.2	1.9	1.9	1.8
Other Support Services	0.1	0.1	0.1	0.1	0.1
Waste Collection	0.0*	0.1	0.1	0.1	0.3
Waste Treatment & Disposal	0.2	0.3	0.1	0.2	0.1
Remediation & Other Waste Mgmt Svcs	0.0	0.1	0.0	0.0	0.1

Source: California Employment Development Department. Data for 2001 and 2004 are presented from the current analysis of 2001-2004 data. The data source has changed since the earlier report.

* Employment was reported; however, jobs were less than 50, which rounded to 0.0 thousands.

HEALTH SCIENCES & SERVICES

For the previous economic base report, the Health Care & Social Assistance industry was used for studying employment in health care. The industry also included social services. For this and future reports, the Health Sciences & Services industry cluster will be used instead of Health Care & Social Assistance.

The Health Sciences & Services cluster includes health care services, such as offices of physicians, dentists, other health practitioners and other outpatient care facilities; hospitals; laboratories; home health care; nursing care and other residential care facilities. It also includes community, emergency and other relief services; vocational rehabilitation services; and, death care services. Within health sciences, the cluster includes pharmaceutical and medicine manufacturing; medical equipment and supplies manufacturing; and, scientific research and development (R&D) services.

In 2004, the Health Sciences & Services industry cluster was the third largest component of the Northern Sacramento Valley Region's economic base, providing over 14% of the economic base jobs, and just over 12% of all jobs in the region.

From 1990-2002, the cluster grew over 67%, from 12,800 jobs in 1990 to 21,400 jobs in 2002, as reported in the study, *Golden Opportunity, Growing Crisis: The Health Sciences and Services Cluster (September 2004)*. Within the cluster, the largest employment sub-sectors are in Health Services. The sub-sector with the highest employment was General & Medical Surgical Hospitals (7,300 jobs in 2002), followed by Offices of Physicians (3,300 jobs) and Nursing Care Facilities (over 2,000 jobs). Very small sub-sectors reporting high growth included Medical & Diagnostic Testing Laboratories (133%), and Scientific Research and Development Services (up 20% from 2000 – 2002).

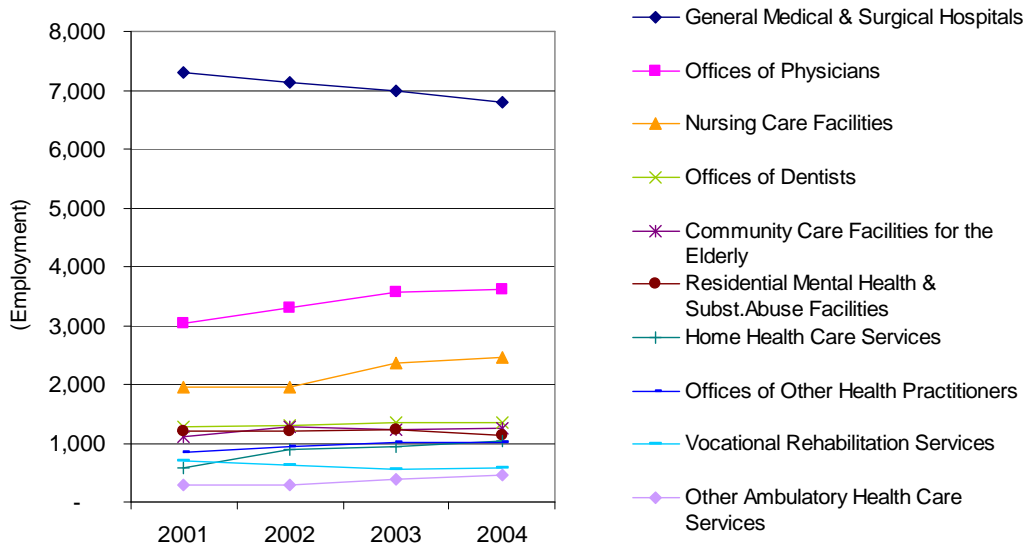
From 2001-2004, Health Sciences & Services reported job growth of almost 8%; employment rose steadily from 2001-2003, and then leveled off in 2004. During this period, General & Medical Surgical Hospitals continued to provide the most jobs within the cluster (almost 6,800 jobs in 2004), although reporting an overall loss of almost 7%. At the same time, the second largest sub-sector, Offices of Physicians (3,600 jobs), grew by over 18%, and the third largest, Nursing Care Facilities (2,400 jobs), grew by over 11%.

During this same period, smaller sub-sectors that reported high growth rates included Home Health Care Services (up 78%), Other Ambulatory Health Care Services (up 60.5%) and Outpatient Care Centers (up 29%).

The three health sciences sub-sectors include Pharmaceutical & Medicine Manufacturing, Medical Equipment & Supplies Manufacturing, and Scientific Research & Development Services. While these sub-sectors do not provide a large number of jobs for the region, both Medical Equipment & Supplies Manufacturing and Scientific Research & Development Services reported job growth from 2001-2004. No employment was reported for Pharmaceutical & Medicine Manufacturing.

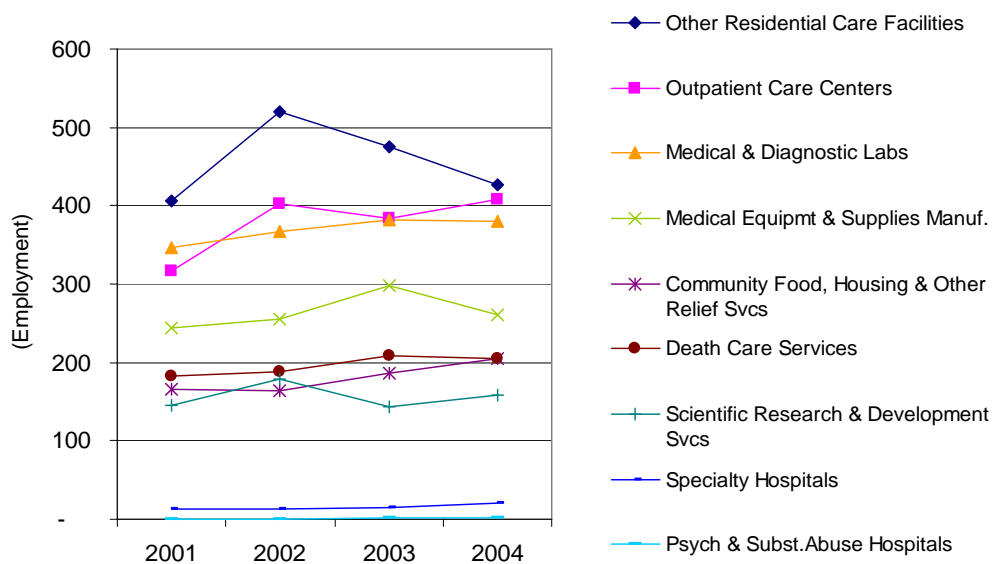
The following graph shows the change in employment from 2001 to 2004 for the top ten sub-sectors, based on 2004 employment levels:

Health Sciences & Services Jobs



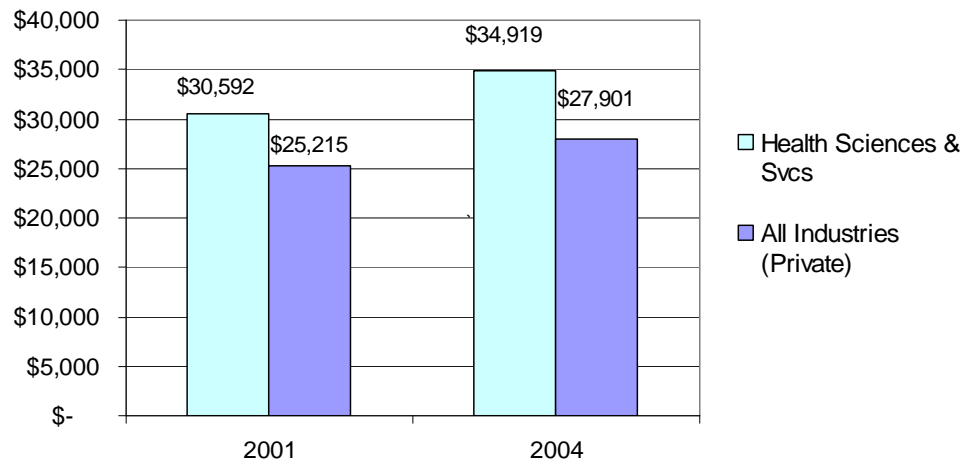
The next graph shows the change in employment from 2001 to 2004 for the remaining sub-sectors:

More Health Sciences & Services Jobs 2001-2004



The cluster's average annual wage for the region in 2004 was \$34,919, up just over 14% from the 2001 average of \$30,592. Health Sciences & Services provides 14% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

Health Sciences & Services Wages



The following table provides data on cluster employment by sub-sector for 2001-2004:

Northern Sacramento Valley Health Sciences & Services (Thousands of Jobs)				
	2001	2002	2003	2004
Pharmaceutical & Medicine Manufacturing	0.0	0.0	0.0	0.0
Medical Equipment & Supplies Manufacturing	0.2	0.3	0.3	0.3
Scientific Research & Development Services	0.1	0.2	0.1	0.2
Offices of Physicians	3.0	3.3	3.6	3.6
Offices of Dentists	1.3	1.3	1.3	1.4
Offices of Other Health Practitioners	0.9	0.9	1.0	1.0
Outpatient Care Centers	0.3	0.4	0.4	0.4
Medical & Diagnostic Laboratories	0.3	0.4	0.4	0.4
Home Health Care Services	0.6	0.9	0.9	1.0
Other Ambulatory Health Care Services	0.3	0.3	0.4	0.5
General Medical & Surgical Hospitals	7.3	7.1	7.0	6.8
Psychiatric & Substance Abuse Hospitals	0	0	0.0*	0.0*
Specialty (except Psychiatric & Subst. Abuse) Hospitals	0.0*	0.0*	0.0*	0.0*
Nursing Care Facilities	1.9	2.0	2.4	2.5
Residential Mental Health & Subst. Abuse Facilities	1.2	1.2	1.3	1.1
Community Care Facilities for the Elderly	1.1	1.3	1.2	1.2

Other Residential Care Facilities	0.4	0.5	0.5	0.4
Comm. Food, Housing, Emergency & Other Relief Svcs	0.2	0.2	0.2	0.2
Vocational Rehabilitation Services	0.7	0.6	0.6	0.6
Death Care Services	0.2	0.2	0.2	0.2

Source: California Employment Development Department

Data for 1990 – 2002 are presented from the previous economic base report.

* Employment was reported in 2004; however, jobs were less than 50, which rounded to 0.0 thousands.

ENTERTAINMENT & TOURISM

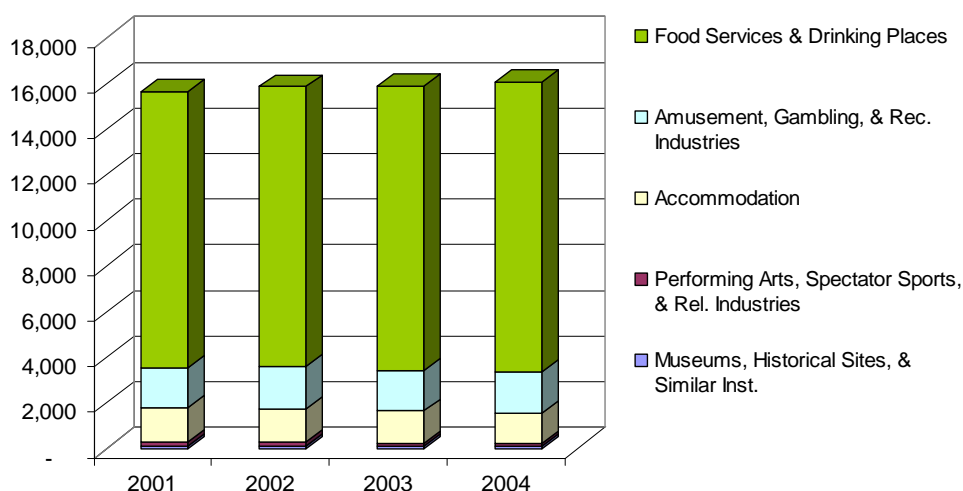
The Entertainment & Tourism Industry combines Accommodation & Food Services with Arts, Entertainment & Recreation. For the previous economic base report, these two sectors were considered separately, and only an analysis of Accommodation & Food Services was included in the report.

Entertainment & Tourism provides over 9%% of the Northern Sacramento Valley Region's economic base jobs, and almost 8% of all jobs in the region.

From 1990-2002, Accommodation & Food Services (analyzed separately) showed steady growth. This sector was driven by Limited-Service Eating Places, Full Service Restaurants and Traveler Accommodations. Growth was primarily in Limited-Service Eating Places, followed by Full Service Restaurants.

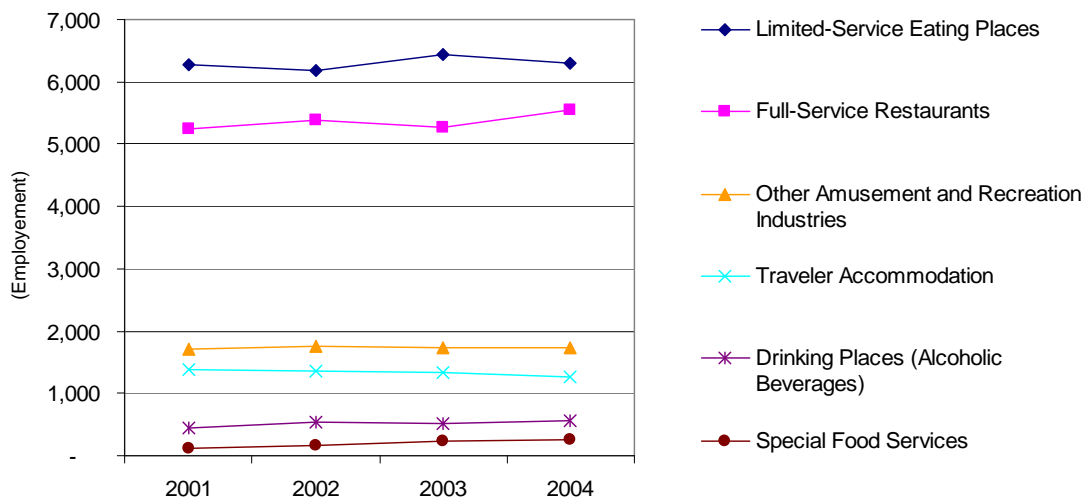
During the 2001-2004 period, Entertainment & Tourism grew by over 400 jobs, or over 3%. The Food Services & Drinking Places sector reported growth of 5%, while the Accommodation sector reported job losses of over 11%. Accommodation represents only 9.5% of the jobs in the industry, while Food Services & Drinking Places represents 90.5%.

**Entertainment & Tourism Industry
Major Sector Employment**



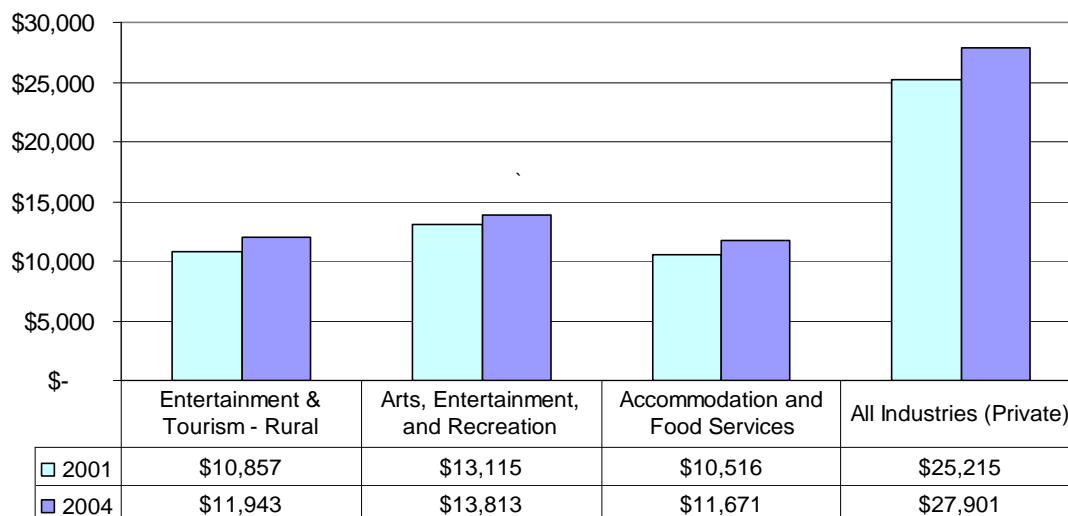
The Limited-Service Eating Places sub-sector continues to provide the most jobs within the industry, reporting 6,300 jobs in 2004, although growth fluctuated during the period, with a net gain of less than 1%. The Full Service Restaurants sub-sector provides the second highest number of jobs in the industry, with almost 5,600 jobs in 2004. This sub-sector grew by almost 6% from 2001-2004.

Entertainment & Tourism Jobs Top Six Sub-sectors



The industry's average annual wage for the region in 2004 was \$11,943, up 10% from the 2001 average of \$10,857. Entertainment & Tourism provides 10% of the region's economic base jobs. Within the industry, the Arts, Entertainment & Recreation sector reported the highest average wage. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

Entertainment & Tourism Wages



The following table provides data on all sub-sectors in the industry, listed in NAICS code order:

Northern Sacramento Valley Entertainment & Tourism (Thousands)				
	2001	2002	2003	2004
Performing Arts Companies	0.0*	0.0*	0.0*	0.0*
Spectator Sports	0.1	0.1	0.0*	0.0*
Promoters of Performing Arts, Sports, & Similar Events	0.0*	0.0*	0.0*	0.0*
Agents & Managers for Public Figures	0.0*	0.0*	0.0*	0.0*
Independent Artists, Writers, & Performers	0.1	0.1	0.1	0.1
Museums, Historical Sites, & Similar Institutions	0.1	0.1	0.1	0.1
Amusement Parks and Arcades	0.0*	0.0*	0.0*	0.0*
Gambling Industries	0.0*	0.1	0.0*	0.0*
Other Amusement & Recreation Industries	1.7	1.8	1.7	1.7
Traveler Accommodation	1.4	1.3	1.3	1.3
RV (Recreational Vehicle) Parks & Rec. Camps	0.1	0.1	0.1	0.1
Rooming and Boarding Houses	0.1	0.1	0.0*	0.0*
Full-Service Restaurants	5.2	5.4	5.3	5.6
Limited-Service Eating Places	6.3	6.2	6.4	6.3
Special Food Services	0.1	0.2	0.2	0.3
Drinking Places (Alcoholic Beverages)	0.5	0.5	0.5	0.6

Source: California Employment Development Department

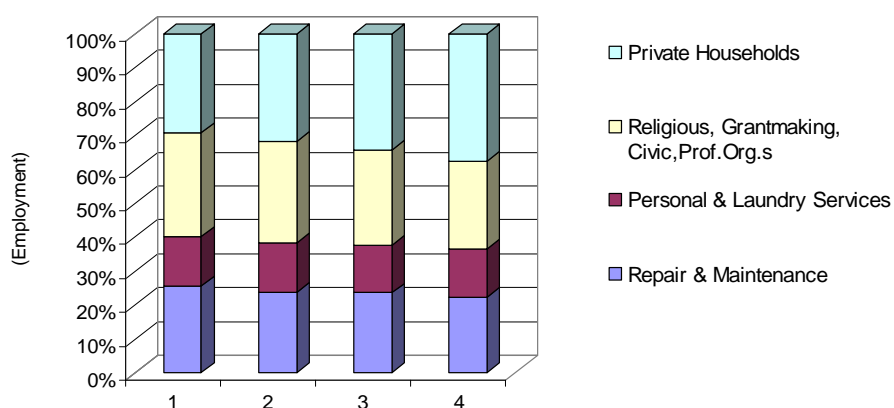
* Employment was reported; however, jobs were less than 50, which rounded to 0.0 thousands.

OTHER SERVICES (Except Public Administration)

The Other Services industry includes a variety of services, such as automotive repair and maintenance, religious and civic organizations, personal care services and professional organizations. Other Services provides over 6% of the Northern Sacramento Valley Region's economic base jobs and 11.5% of all jobs in the region.

From 1990-2002, Other Services grew steadily from over 4,200 jobs in 1990 to almost 7,000 jobs in 2002, with a brief dip in 2001. During 2001-2004, the industry reported about 9,500 jobs; an increase of almost 1,000 jobs, or 11.5%.

Other Services Jobs



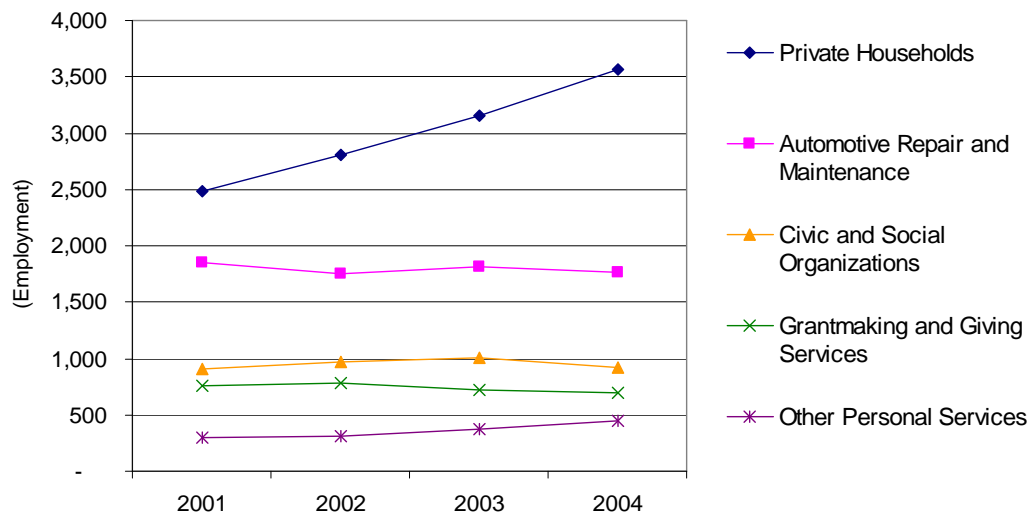
The largest sub-sector is Private Households, which provides almost 3,600 jobs for the region, and reported growth of over 43% from 2001-2004. Private Households reported steady growth from 2001-2004.

Next, Automotive Repair & Maintenance provides over 1,700 jobs; this sub-sector reported job losses of less than 100 – less than 5%. Job growth fluctuated during 2001-2004. Third, Civic and Social Organizations provides over 900 jobs and reported growth of just over 1%. Employment grew steadily from 2001-2003, and then dropped slightly in 2004.

Rounding out the top five sub-sectors, Grantmaking & Giving Services reported almost 700 jobs in 2004, down from 2001 by over 8%; Other Personal Services reported over 400 jobs in 2004, up from 2001 by almost 48%.

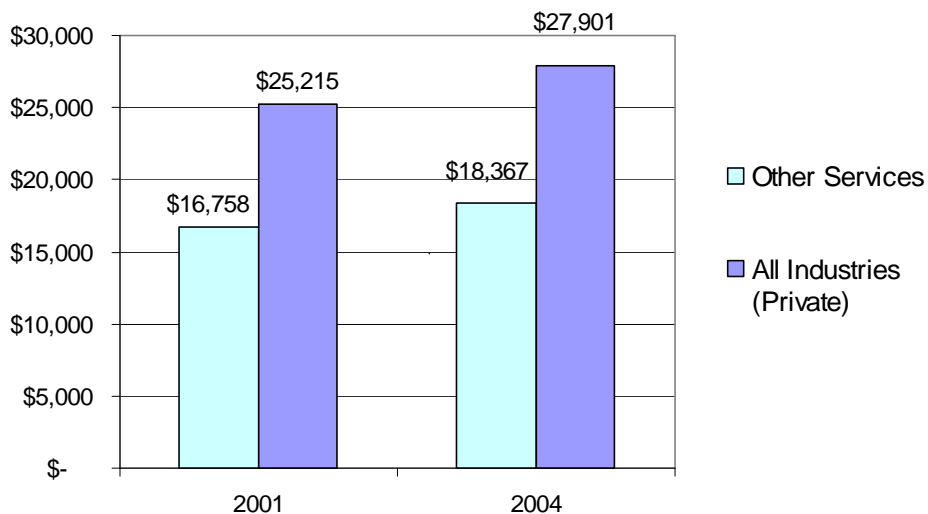
The two sub-sectors reporting the highest growth rate, from 2001-2004, were Other Personal Services (up almost 48%) and Private Households (up over 43%).

Other Services Sub-sector Jobs



The industry's average annual wage for the region in 2004 was \$17,885, up 10.5% from the 2001 average of \$16,187. Other Services provides 6% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

Other Services Wages



The following table provides data on employment by sub-sector:

Northern Sacramento Valley Other Services (Thousands)					
	1990	1994	2000	2002	2004
Automotive Repair & Maintenance	1.0	1.2	1.6	1.8	1.8
Electronic & Precision Equip. Repair & Maint.	0.1	0.1	0.1	0.1	0.1
Commercial & Industrial Machinery & Equipment	0.2	0.2	0.2	0.2	0.2
Personal & Household Goods Repair & Maintenance	0.1	0.1	0.1	0.1	0.1
Personal Care Services	0.4	0.3	0.3	0.4	0.3
Death Care Services	0.2	0.1	0.1	0.2	0.2
Drycleaning & Laundry Services	0.3	0.3	0.3	0.4	0.3
Other Personal Services	0.1	0.3	0.3	0.3	0.5
Religious Organizations**	0.6	0.7	0.8	1.0	0.2
Grantmaking & Giving Services	0.3	0.4	0.7	0.8	0.7
Social Advocacy Organizations	0.2	0.3	0.3	0.4	0.4
Civic & Social Organizations	0.6	0.7	0.8	1.0	0.9
Business, Professional, Labor, Political Org.s	0.3	0.3	0.3	0.3	0.3
Private Households	—	—	—	2.8	3.6

Source: California Employment Development Department

Data for 1990 – 2002 are presented from the previous economic base report, except for Private Households. Totals from the previous report were not available; using current data for the 2002 total.

*Employment was reported in 2004; however, jobs were less than 50, which rounded to 0.0 thousands.

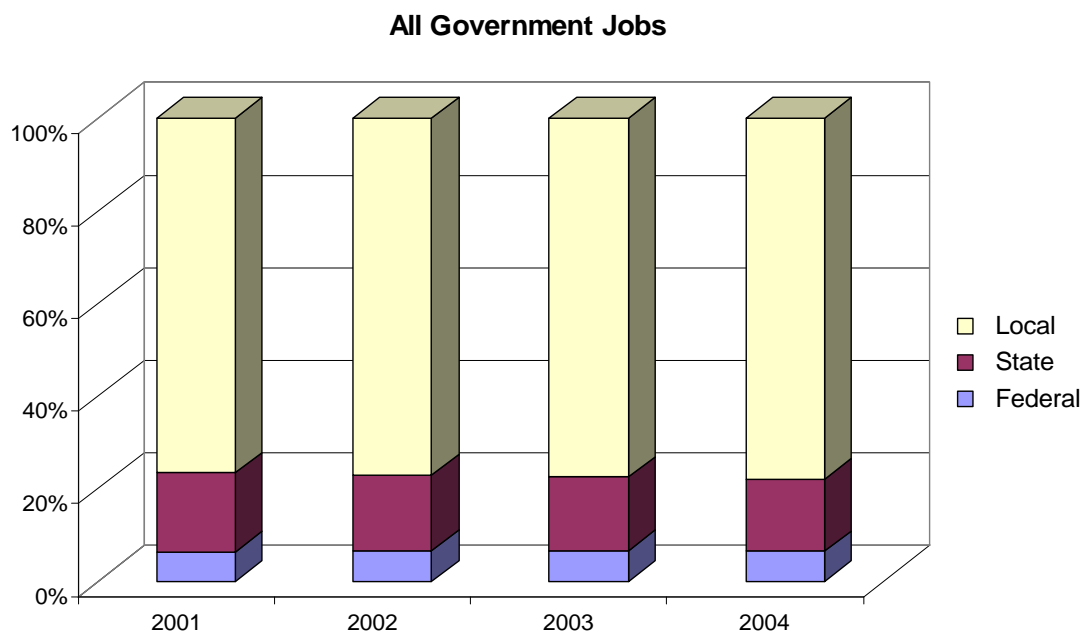
** The current data reports significantly different job totals for this sub-sector in 2002.

ALL GOVERNMENT

All Government includes federal, state and local government jobs. Jobs in public education are reported in the state and local government sectors. Government jobs also include defense (reported at the federal level), law enforcement, firefighting and public services.

All Government continues to provide the greatest number of jobs for the Northern Sacramento Valley Region, and continues to report job growth. From 1990-2002, All Government jobs grew from over 20,000 to almost 30,000 jobs⁴. The data for the period 2001-2004 reports 38,500 jobs in 2002, the peak of the job growth, with slight decreases for the next two years, to 37,600 jobs in 2004. Overall, All Government grew by 1.5% for the 2001-2004 period.

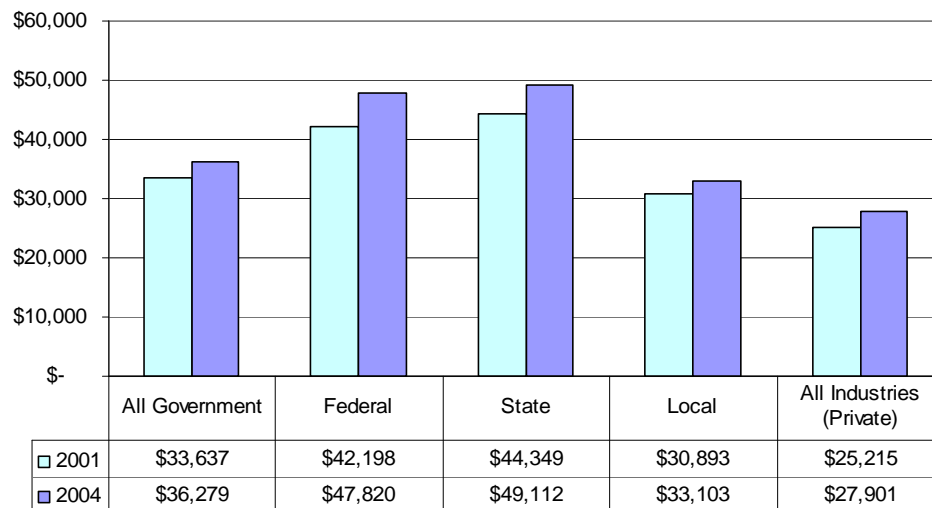
Local Government, which includes Local Education, continues to provide the greatest number of jobs for the region. In 2004, Local Government totaled 29,200 jobs. From 2001-2004, Local Government increased by almost 900 jobs, up 3%. During this same period, Federal Government jobs grew about 100 jobs, up almost 5%; and, State Government jobs decreased by almost 500, down over 7%.



⁴ Due to the change in data sources from the economic base reports covering 1990-2002 to the current report covering 2001-2004, the number of jobs reported for 2001 and 2002 may vary. In this case, the All Government jobs were counted at almost 30,000 for 2002 in the earlier base report, while the current data reports closer to 38,500 jobs.

All Government average annual wages include the wages for a broad spectrum of jobs, including elected officials and executive branch, judicial, defense, law enforcement, firefighting, education and other public administration jobs. The industry's average annual wage for the region in 2004 was \$36,279, up almost 8% from the 2001 average of \$33,637. Within All Government, the average annual wage for Federal Government was \$47,820; the average for State Government was \$49,112; and, the average annual wage for Local Government was \$33,103. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

All Government Wages



The following table shows employment for each level of government from 2001-2004:

Northern Sacramento Valley All Government (Thousands of Jobs)				
	2001	2002	2003	2004
Local Government (includes education)	28.3	29.6	29.7	29.2
State Government excluding Education	3.1	3.1	3.1	3.1
State Government Education	3.2	3.2	3.0	2.8
Federal Government (includes defense)	2.3	2.6	2.6	2.5

Source: Employment Development Department

APPENDIX A: Definition of Industry Sectors and Clusters by NAICS Codes

The following lists the major industries and clusters included in the economic base reports, and defines them by NAICS code and classification. Most of these are defined at the three-digit and/or four-digit NAICS code levels, but some are defined at the five-digit and/or six-digit NAICS code levels.

THE FOOD CHAIN

Distribution

4244	Grocery and Related Product Wholesalers
4245	Farm Product Raw Material Merchant Wholesalers
4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
42491	Farm Supplies Merchant Wholesalers
4452	Specialty Food Stores
49313	Farm Product Warehousing and Storage

Processing

3111	Animal Food Manufacturing
3112	Grain and Oilseed Milling
3113	Sugar and Confectionery Product Manufacturing
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing
3115	Dairy Product Manufacturing
3116	Animal Slaughtering and Processing
3117	Seafood Product Preparation and Packaging
3118	Bakeries and Tortilla Manufacturing
3119	Other Food Manufacturing
322215	Nonfolding Sanitary Food Container Manufacturing
32616	Plastics Bottle Manufacturing
327213	Glass Container Manufacturing
332115	Crown and Closure Manufacturing
332431	Metal Can Manufacturing
31211	Soft Drink and Ice Manufacturing
31212	Breweries
31213	Wineries
31214	Distilleries

Production

1111	Oilseed and Grain Farming
1113	Fruit and Tree Nut Farming
11141	Food Crops Grown Under Cover
11193	Sugarcane Farming
11194	Hay Farming
111991	Sugar Beet Farming
111992	Peanut Farming

1112	Vegetable and Melon Farming
111998	All Other Miscellaneous Crop Farming
1121	Cattle Ranching and Farming
1122	Hog and Pig Farming
1123	Poultry and Egg Production
1124	Sheep and Goat Farming
1125	Animal Aquaculture
1129	Other Animal Production
1141	Fishing
1142	Hunting and Trapping

Support

1151	Support Activities for Crop Production
1152	Support Activities for Animal Production
22131	Water Supply and Irrigation Systems
23711	Water and Sewer Line and Related Structures Construction
32192	Wood Container and Pallet Manufacturing
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
33311	Agricultural Implement Manufacturing
333294	Food Product Machinery Manufacturing
42382	Farm and Garden Machinery and Equipment Merchant Wholesalers
54194	Veterinary Services

CONSTRUCTION

236	Construction of Buildings
2361	Residential Building Construction
2362	Nonresidential Building Construction
237	Heavy and Civil Engineering Construction
2371	Utility System Construction
2372	Land Subdivision
2373	Highway, Street, and Bridge Construction
2379	Other Heavy and Civil Engineering Construction
238	Specialty Trade Contractors
2381	Foundation, Structure, and Building Exterior Contractors
2382	Building Equipment Contractors
2383	Building Finishing Contractors
2389	Other Specialty Trade Contractors

MANUFACTURING VALUE CHAIN

Design

5413	Architectural, Engineering, and Related Services
5414	Specialized Design Services
5416	Management, Scientific, and Technical Consulting Services
5419	Other Professional, Scientific, and Technical Services

Production

3111	Animal Food Manufacturing
3112	Grain and Oilseed Milling
3113	Sugar and Confectionery Product Manufacturing
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing
3115	Dairy Product Manufacturing
3116	Animal Slaughtering and Processing
3117	Seafood Product Preparation and Packaging
3118	Bakeries and Tortilla Manufacturing
3119	Other Food Manufacturing
3121	Beverage Manufacturing
3122	Tobacco Manufacturing
3131	Fiber, Yarn, and Thread Mills
3132	Fabric Mills
3133	Textile and Fabric Finishing and Fabric Coating Mills
3141	Textile Furnishings Mills
3149	Other Textile Product Mills
3151	Apparel Knitting Mills
3152	Cut and Sew Apparel Manufacturing
3159	Apparel Accessories and Other Apparel Manufacturing
3161	Leather and Hide Tanning and Finishing
3162	Footwear Manufacturing
3169	Other Leather and Allied Product Manufacturing
3211	Sawmills and Wood Preservation
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing
3219	Other Wood Product Manufacturing
3221	Pulp, Paper, and Paperboard Mills
3222	Converted Paper Product Manufacturing
3231	Printing and Related Support Activities
3241	Petroleum and Coal Products Manufacturing
3251	Basic Chemical Manufacturing
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments M
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
3255	Paint, Coating, and Adhesive Manufacturing
3256	Soap, Cleaning Compound, and Toilet Preparation Manufacturing
3259	Other Chemical Product and Preparation Manufacturing
3261	Plastics Product Manufacturing
3262	Rubber Product Manufacturing
3271	Clay Product and Refractory Manufacturing
3272	Glass and Glass Product Manufacturing
3273	Cement and Concrete Product Manufacturing
3274	Lime and Gypsum Product Manufacturing
3279	Other Nonmetallic Mineral Product Manufacturing
3311	Iron and Steel Mills and Ferroalloy Manufacturing
3312	Steel Product Manufacturing from Purchased Steel
3313	Alumina and Aluminum Production and Processing
3314	Nonferrous Metal (except Aluminum) Production and Processing
3315	Foundries
3321	Forging and Stamping

3322	Cutlery and Handtool Manufacturing
3323	Architectural and Structural Metals Manufacturing
3324	Boiler, Tank, and Shipping Container Manufacturing
3325	Hardware Manufacturing
3326	Spring and Wire Product Manufacturing
3327	Machine Shops-Turned Product- and Screw, Nut, and Bolt Manufacturing
3328	Coating, Engraving, Heat Treating, and Allied Activities
3329	Other Fabricated Metal Product Manufacturing
3331	Agriculture, Construction, and Mining Machinery Manufacturing
3332	Industrial Machinery Manufacturing
3333	Commercial and Service Industry Machinery Manufacturing
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing
3335	Metalworking Machinery Manufacturing
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing
3339	Other General Purpose Machinery Manufacturing
3341	Computer and Peripheral Equipment Manufacturing
3342	Communications Equipment Manufacturing
3343	Audio and Video Equipment Manufacturing
3344	Semiconductor and Other Electronic Component Manufacturing
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
3346	Manufacturing and Reproducing Magnetic and Optical Media
3351	Electric Lighting Equipment Manufacturing
3352	Household Appliance Manufacturing
3353	Electrical Equipment Manufacturing
3359	Other Electrical Equipment and Component Manufacturing
3361	Motor Vehicle Manufacturing
3362	Motor Vehicle Body and Trailer Manufacturing
3363	Motor Vehicle Parts Manufacturing
3364	Aerospace Product and Parts Manufacturing
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing
3372	Office Furniture (including Fixtures) Manufacturing
3379	Other Furniture Related Product Manufacturing

Logistics

4811	Scheduled Air Transportation
4812	Nonscheduled Air Transportation
4821	Rail Transportation
4831	Deep Sea, Coastal, and Great Lakes Water Transportation
4832	Inland Water Transportation
4841	General Freight Trucking
4842	Specialized Freight Trucking
4861	Pipeline Transportation of Crude Oil
4862	Pipeline Transportation of Natural Gas
4869	Other Pipeline Transportation
4881	Support Activities for Air Transportation
4882	Support Activities for Rail Transportation
4883	Support Activities for Water Transportation
4884	Support Activities for Road Transportation
4885	Freight Transportation Arrangement

4889	Other Support Activities for Transportation
4911	Postal Service
4921	Couriers
4922	Local Messengers and Local Delivery
4931	Warehousing and Storage

WHOLESALE TRADE

423	Merchant Wholesalers, Durable Goods
424	Merchant Wholesalers, Nondurable Goods
425	Wholesale Electronic Markets & Agents & Brokers

RETAIL TRADE

441	Motor Vehicle and Parts Dealers
4411	Automobile Dealers
4412	Other Motor Vehicle Dealers
4413	Automotive Parts, Accessories, and Tire Stores
442	Furniture and Home Furnishings Stores
4421	Furniture Stores
4422	Home Furnishings Stores
443	Electronics and Appliance Stores
4431	Electronics and Appliance Stores
444	Building Material and Garden Equipment and Supplies Dealers
4441	Building Material and Supplies Dealers
4442	Lawn and Garden Equipment and Supplies Stores
445	Food and Beverage Stores
4451	Grocery Stores
4452	Specialty Food Stores
4453	Beer, Wine, and Liquor Stores
446	Health and Personal Care Stores
4461	Health and Personal Care Stores
447	Gasoline Stations
4471	Gasoline Stations
448	Clothing and Clothing Accessories Stores
4481	Clothing Stores
4482	Shoe Stores
4483	Jewelry, Luggage, and Leather Goods Stores
451	Sporting Goods, Hobby, Book, and Music Stores
4511	Sporting Goods, Hobby, and Musical Instrument Stores
4512	Book, Periodical, and Music Stores
452	General Merchandise Stores
4521	Department Stores
4529	Other General Merchandise Stores
453	Miscellaneous Store Retailers
4531	Florists
4532	Office Supplies, Stationery, and Gift Stores
4533	Used Merchandise Stores
4539	Other Miscellaneous Store Retailers
454	Nonstore Retailers

- 4541 Electronic Shopping and Mail-Order Houses
- 4542 Vending Machine Operators
- 4543 Direct Selling Establishments

BASIC INFORMATION SERVICES

- 511 Publishing Industries (except Internet)
- 515 Broadcasting (except Internet)
- 516 Internet Publishing and Broadcasting
- 517 Telecommunications
- 518 Internet Service Providers, Web Search Portals, and Data Processing Serv
- 519 Other Information Services

- 5111 Newspaper, Periodical, Book, and Directory Publishers
- 5112 Software Publishers
- 5151 Radio and Television Broadcasting
- 5152 Cable and Other Subscription Programming
- 5161 Internet Publishing and Broadcasting
- 5171 Wired Telecommunications Carriers
- 5172 Wireless Telecommunications Carriers (except Satellite)
- 5173 Telecommunications Resellers
- 5174 Satellite Telecommunications
- 5175 Cable and Other Program Distribution
- 5179 Other Telecommunications
- 5181 Internet Service Providers and Web Search Portals
- 5182 Data Processing, Hosting, and Related Services
- 5191 Other Information Services

REAL ESTATE & RENTAL & LEASING

- 531 Real Estate
- 5311 Lessors of Real Estate
- 5312 Offices of Real Estate Agents and Brokers
- 5313 Activities Related to Real Estate
- 532 Rental and Leasing Services
- 5321 Automotive Equipment Rental and Leasing
- 5322 Consumer Goods Rental
- 5323 General Rental Centers
- 5324 Commercial and Industrial Machinery and Equipment Rental and Leasing
- 533 Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)
- 5331 Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)

PROFESSIONAL, SCIENTIFIC, TECHNICAL & MANAGEMENT SERVICES

- 541 Professional, Scientific, and Technical Services
- 5411 Legal Services
- 5412 Accounting, Tax Preparation, Bookkeeping, and Payroll Services
- 5413 Architectural, Engineering, and Related Services
- 5414 Specialized Design Services

5415	Computer Systems Design and Related Services
5416	Management, Scientific, and Technical Consulting Services
5417	Scientific Research and Development Services
5418	Advertising and Related Services
5419	Other Professional, Scientific, and Technical Services
551	Management of Companies and Enterprises
5511	Management of Companies and Enterprises

ADMINISTRATIVE & SUPPORT & WASTE SERVICES

561	Administrative and Support Services
5611	Office Administrative Services
5612	Facilities Support Services
5613	Employment Services
5614	Business Support Services
5615	Travel Arrangement and Reservation Services
5616	Investigation and Security Services
5617	Services to Buildings and Dwellings
5619	Other Support Services
562	Waste Management and Remediation Services
5621	Waste Collection
5622	Waste Treatment and Disposal
5629	Remediation and Other Waste Management Services

HEALTH SCIENCES & SERVICES

3254	Pharmaceutical and Medicine Manufacturing
3391	Medical Equipment and Supplies Manufacturing
5417	Scientific Research and Development Services
6211	Offices of Physicians
6212	Offices of Dentists
6213	Offices of Other Health Practitioners
6214	Outpatient Care Centers
6215	Medical and Diagnostic Laboratories
6216	Home Health Care Services
6219	Other Ambulatory Health Care Services
6221	General Medical and Surgical Hospitals
6222	Psychiatric and Substance Abuse Hospitals
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals
6231	Nursing Care Facilities
6232	Residential Mental Retardation, Mental Health and Substance Abuse Facilities
6233	Community Care Facilities for the Elderly
6239	Other Residential Care Facilities
6242	Community Food and Housing, and Emergency and Other Relief Services
6243	Vocational Rehabilitation Services
8122	Death Care Services

ENTERTAINMENT & TOURISM – URBAN REGIONS

512	Motion Picture and Sound Recording Industries
711	Performing Arts, Spectator Sports, and Related Industries
712	Museums, Historical Sites, and Similar Institutions
713	Amusement, Gambling, and Recreation Industries
721	Accommodation

ENTERTAINMENT & TOURISM – RURAL REGIONS

711	Performing Arts, Spectator Sports, and Related Industries
712	Museums, Historical Sites, and Similar Institutions
713	Amusement, Gambling, and Recreation Industries
721	Accommodation
722	Food Services and Drinking Places

OTHER SERVICES (EXCEPT PUBLIC ADMINISTRATION)

811	Repair and Maintenance
8111	Automotive Repair and Maintenance
8112	Electronic and Precision Equipment Repair and Maintenance
8113	Commercial and Industrial Machinery and Equipment
8114	Personal and Household Goods Repair and Maintenance
812	Personal and Laundry Services
8121	Personal Care Services
8122	Death Care Services
8123	Drycleaning and Laundry Services
8129	Other Personal Services
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations
8131	Religious Organizations
8132	Grantmaking and Giving Services
8133	Social Advocacy Organizations
8134	Civic and Social Organizations
8139	Business, Professional, Labor, Political, and Similar Organizations
814	Private Households
8141	Private Households

ALL GOVERNMENT

Federal Government
Department of Defense
Other Federal Government
State Government
State Government Education
Other State Government
Local Government
Local Government Education
Other Local Government



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